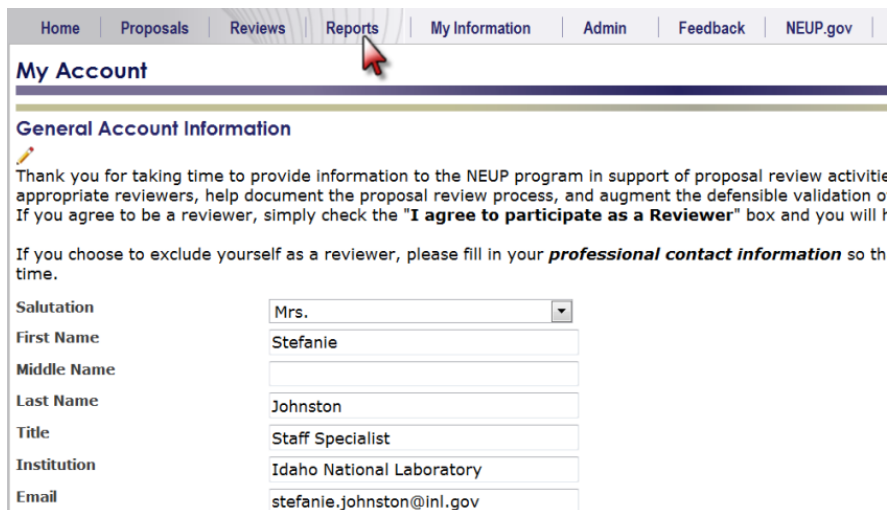# Quarterly Report Instructions

Visit www.neup.gov and log in at the upper right corner. For assistance, contact the NEUP IO at (208) 526-1104 or email .Jenna.Payne@inl.gov.

After logging in, the My Account section will appear and general account information should be updated if necessary. Hover the mouse cursor over **Reports** and select **Quarterly Report**.

The Quarterly Report home screen will appear and there are several filtering options available to access reports. One way is to select the project ID from the 'No Proposal Filter' or by using the Quarter and Status filters. For example, type in 'New' under status, select 'Contains' and all reports in a New status will appear.

Various sections, such as Collaborators, allow users to import information from the previous quarter. Collaborators can now be updated each quarter to reflect current partners. This applies to the Students section as well.

Collaborators

Instructions

The **Import last quarter collaborators** button, located above the table, will import collaborators from the previous quarter. For new collaborators, select the **Add new Collaborator** button at the bottom of the table and save. Collaborators no longer involved with the project should be deleted.

[Import last quarter collaborators]

Name	Organization	Phone	Email	State	City	Action
David Bartels	University of Notre Dame					Edit Delete

+ Add new Collaborator

Current Status should reflect the progress of the project and provide plans of action for any existing issues and concerns. All fields should be updated directly; avoid uploading a document in place of this section.

Current Status

Instructions

The **Import last quarter status** button, located above the table, will import the status from the previous quarter. The Current Status is the project status only and not for scientific information. To enter in a new task and status do the following:

1. Click on the **Add New Task** button located at the bottom of the table
2. Label the task
3. Provide a brief status
4. Desrcibe any issues and/or concerns
5. Offer a corrective action plan
6. Click the **Save task** link to save all work

Hints

Text alone can be pasted into the report by the steps below:

1. Copy text from other file
2. Click inside the desired box
3. Press 'Ctrl' and 'V' at the same time
4. Allow the system to 'clean' the content pasted

To provide additional scientific information, upload a PDF or Word file in the 'Patents/Publications/Presentations/Reports' section.

Sample Report

This information is exported into the summary report submitted to DOE-HQ. Provide a description of the status, issues/concerns, and corrective action plan that can be exported rather than referring to an attachment.

[Import last quarter status]

Task	Status	Issues/Concerns	Corrective Action Plan	Action
Fabrication of the dedicated beamline for		none	none	Edit Delete

+ Add new task

| | | Page: 1 of 1 Go Page size: 3 Change | | Item 1 to 3 of 3 |

Any documents to support information entered can be uploaded in the Patents/Publications/Presentations/Reports section as shown below.

Patents/Publications/Presentations/Reports

List any publication, presentation, patent, or report during the current quarter. Note that quarterly reports should be labeled as reports. Include the following information:

- Select the type of document it is (publication, report, etc.)
- Complete title of the presentation, publication, Patent, etc.

Milestones can also be imported and new ones added. Below this table, be sure to enter the overall percent complete in order to submit a report. No characters are allowed in this field. To enter 95%, simple enter 95.

Milestones

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Instructions

The **Import last quarter milestones** button, located above the table, will import information from the previous quarter. To add new milestones, select the **Add new milestone** button and click the **Add** button when finished entering the fields.

Below the milestones table, the **Overall Percent Complete** box must be filled out with numbers only, no characters.

[Import last quarter milestones]

Overall Percent Complete [95]

The spend plan should have the planned amount entered for the duration of the project initially with actual spending reported each quarter.

Spending Plan

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Enter the spend plan for the full term of the project. Each quarter, report actual spending or invoiced amounts.

Total Awarded: $798,944.00

ID	YearDisplay	Planned Amount $	Cumulative Amount	Actual Spending	Cumulative YTD	Remaining Funds	Percent Spent
1	Year 1 Q1	$67,595.25	$67,595.25	$40,218.00	$40,218.00	$758,726.00	5.03 %
2	Year 1 Q2	$67,595.25	$135,190.50	$184,189.00	$224,407.00	$574,537.00	28.09 %
3	Year 1 Q3	$67,595.25	$202,785.75	$126,762.00	$351,169.00	$447,775.00	43.95 %
4	Year 1 Q4	$67,595.25		$12,766.00	$363,935.00	$435,009.00	45.55 %
5	Year 2 Q1	$52,465.25		$20,682.00	$384,617.00	$414,327.00	48.14 %
6	Year 2 Q2	$52,465.25		$28,917.00	$413,534.00	$385,410.00	51.76 %
7	Year 2 Q3	$52,465.25		$32,058.	$445,592.00	$353,352.00	55.77 %
8	Year 2 Q4	$52,465.25	$480,242.00	$41,153.	$486,745.00	$312,199.00	60.92 %
9	Year 3 Q1	$40,259.50	$520,501.50	$14,071.00	$500,816.00	$298,128.00	62.68 %
10	Year 3 Q2	$40,259.50	$560,761.00	$0.00	$500,816.00	$298,128.00	62.68 %
11	Year 3 Q3	$40,259.50	$601,020.50	$0.00	$500,816.00	$298,128.00	62.68 %
12	Year 3 Q4	$40,259.50	$641,280.00	$0.00	$500,816.00	$298,128.00	62.68 %
13	Year 4 Q1	$39,416.00	$680,696.00	$0.00	$500,816.00	$298,128.00	62.68 %
14	Year 4 Q2	$39,416.00	$720,112.00	$0.00	$500,816.00	$298,128.00	62.68 %
15	Year 4 Q3	$39,416.00	$759,528.00	$0.00	$500,816.00	$298,128.00	62.68 %
16	Year 4 Q4	$39,416.00	$798,944.00	$0.00	$500,816.00	$298,128.00	62.68 %

Total Award, Planned Amount and Cumulative totals should all match.

Update each quarter with actual costs.

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The report can be edited and saved at any time. When it's complete, select 'Save and Submit' to send notification to the TPOC to review.

[Save] [Save and Submit]

TPOC Comments:

Federal Approval: